DoD SAP Concur DTM Prototype Supplement:
Travel Manager FAQs

These FAQs supplement the information provided in the _SAP Concur Quick Start Guide for Travelers_ and _SAP Concur Quick Start Guide for Approvers_. You can also find a wealth of introductory information in _the SAP Concur User Guides and Demonstrations_ or at the end of this document.

Note: For best results, use the Chrome browser to access SAP Concur.

1. **How are organizations and sub-organizations formed?**

   The high-level organization structure is developed during Defense Travel Modernization (DTM) implementation phase. If you need to create further sub-organizations, contact the DTM Prototype Implementation Team at dodhra.mc-alex.dtmo.mbx.dtmo-concur@mail.mil to discuss options.

2. **Can I add local policies into SAP Concur?**

   No. The system is configured as a "purple" solution for all of DoD, strictly adhering to Appendix B of the Joint Travel Regulations (JTR).

3. **Is there a field in the DTM Prototype to indicate conferences and teleconferences are insufficient to accomplish the mission as required by the Track Four Efficiencies SECDEF memo?**

   No. That requirement was rescinded on March 13, 2019.

4. **How do I move travelers from one government agency/department to another?**

   When a traveler is moving to another department, a Travel Manager with the Employee Maintenance or Employee Administration role will restrict the traveler's ability to book any new travel until they are in their new group. To do so, un-check the Travel Wizard option in the traveler's user profile and move the traveler to the "Lost and found but not forgotten" group so the new department can accept the traveler.

5. **Must travelers use a "@mail.mil" as their email address?**

   No. Traveler profiles should reflect their official email address. However, when creating a profile, you must enter the number on the back of the traveler's Common Access Card (CAC) + "@mail.mil" (e.g., "0123456789@mailmil") in the Concur Travel and Expense (CTE) Login Name field.

6. **Can travelers self-register in SAP Concur?**

   Currently, no, but we may explore this in the future.

7. **If I have a traveler with short notice travel and the Approver is not available, can I approve the document for the Approver?**

   In most cases, no. The Approver must assign a Delegate (or a Travel Manager) ahead of time to approve the travel. Unless you are that Delegate, you cannot approve the document.

8. **Who are the point of contacts for the Defense Agency Initiatives (DAI)?**

   The DAI Tier 1 Help Desk is your first point of contact (email: dai@dla.mil). If the Help Desk is unable to resolve your problem, they will escalate the matter to the DAI Tier 2 Help Desk.

9. **How do I access the tools I need to do my job when I have Company Card Administration permission?**

   On the SAP Concur home page, under the Administration menu, select Company > Tools. This takes you to the Tools screen. On the Tools screen, select Company Card. This takes you to the Company Card screen, where you can access the tools you need.

10. **How do I look for the Company Card account that I have questions about?**

    Once on the Company Card screen, use the first tab labeled "Manage Accounts." Search by the employee name, ID, email, Name on Card, deleted or canceled accounts, and more. Once you have found the card in question, click the cardholder's name to open additional menu items to Modify, Unassign, or Delete the account.

11. **How can I look at all credit card transactions for my employee or Agency?**

    A Travel Manager with the Budget Viewer, Budget Owner, or Budget Administrator roles can select Reporting > Budget Dashboards, then search by their organization/group line of accounting (LOA). Tip: Explore the Spent Transactions as well as the Spending Categories.
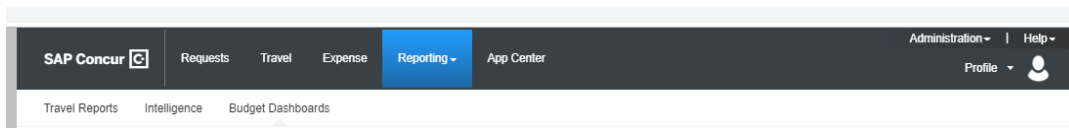
12. **Can a query show the delta between the dollar amount requested and the dollar amount expensed?**

    Yes. On the SAP Concur home screen, select Requests > Process Requests, then update the List Settings to show:

    - Total Approved Amount (Amount obligated on request)
    - Total Remaining Amount (Difference between costs on request and expense)
      - A negative dollar result is the amount overspent.
      - A positive dollar result is the amount underspent.

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13. **What is the difference between the SAP Concur options for "Acting as Other Users"?**

The available options are:

- Act on behalf of another user (Delegate)
    - A person (or a Travel Manager with the Employee Administration or Employee Maintenance role) chooses a Delegate to assist that person with expense reports, approvals, requests, etc. Note: SAP Concur identifies a Delegate with the ability to create reservations as a Travel Assistant/Arranger.
    - For more information, see: https://www.concurtraining.com/customers/tech_pubs/Docs/_Current/SG_Shr/Shr_SG_Delegate_Config.pdf

- Act as a user in assigned group (Proxy)
    - A Travel Manager with the User Administration role (currently this role is not group aware) assigns a Proxy to a group of employees at Component request. The Proxy assists that group as a Help Desk function by accessing a traveler's documents in case of emergency.
    - For more information, see: https://www.concurtraining.com/customers/tech_pubs/Docs/_Current/UG_Exp/Exp_UG_Proxy_Logon.pdf

- Book travel for any user (Self-assign)
    - Today, this role is not group aware. A person with this permission can book travel for any DoD traveler. Discussions to make the role group aware are ongoing.
    - For more information, see: https://www.concurtraining.com/customers/tech_pubs/TravelDocs/FactSheets/Del-Prox-Assist-Arr_FS.pdf

14. **Who notifies the traveler they were overpaid? Who handles debt management?**

A Travel Manager and/or the DAI point of contact notifies the traveler, however, this process varies following your organization's local business rules. Currently, debt notifications go to the financial team and debt collection is handled outside of SAP Concur, but the Defense Travel Management Office is working to create a DoD-wide debt management business process.

15. **What reports am I required to submit? What reports should I run regularly?**

Reporting requirements vary by organization. SAP Concur supports reporting capabilities for many different scenarios. We encourage Travel Managers with Expense Administration, Request Processor, and Cognos Consumer roles to run queries and reports in SAP Concur to replicate those that were useful in DTS and to test the system's reporting capabilities.

16. **Does a report exist that shows payments rejected by the Defense Agency Initiatives (DAI)?**

Not at this time, but SAP Concur supports the ability to run a report that shows expense reports that were "Submitted for payment."

Additional Resources

The links below provide additional information mentioned elsewhere in this Supplement. You'll find the URLs useful when viewing the Supplement in hard copy.

1. SAP Concur Quick Start Guide for Traveler

    https://www.defensetravel.dod.mil/Docs/ConcurGuide1.pdf

2. SAP Concur Quick Start Guide Approvers

    https://www.defensetravel.dod.mil/Docs/ConcurGuide2.pdf

3. SAP Concur User Guides and Demonstrations

    https://www.concurtraining.com/en-us/pr/get-started

4. SAP Concur Home Screen

    https://dodtravel.concursolutions.com

5. SAP Concur Supplement: Home Screen Features

    https://www.defensetravel.dod.mil/Docs/ConcurSupplement2.pdf

6. SAP Concur Supplement: Profile Updates

    https://www.defensetravel.dod.mil/Docs/ConcurSupplement1.pdf